

### AMENDMENTS TO THE CLAIMS

1. (Currently Amended) An information management system comprising:

a first database storing first information for viewing and manipulation by one or more system users, said first information being manipulated and/or viewed by system users but not being used directly to define system operation or function;

a user profile database wherein said database has stored therein identification information which correlates at least one of said system users with a user specific data manipulation logic and/or data display format that at least in part defines system operation;

a rules database storing information defining system response to user modifications to said first information; wherein at least one system response to a first user modifying said first information comprises altering ~~the~~ a user profile of at least a second user.

2. (Original) The system of Claim 1, wherein said databases and associated application programming are web hosted, and wherein said plurality of system users interface with said databases and said associated application programming using a web browser program.

3. (Currently Amended) A computer readable medium having stored thereon instructions which cause a general purpose computer to perform the steps ~~of~~ comprising:

opening client accounts;

recording client information;

executing business transactions; and

updating at least one user profile of a first user in response to one or more of the above steps, wherein said at least one user profile defines information which is available to the first user and data manipulation that the first user may perform, wherein said updating is performed in response to a second user's performance of one or more of the above steps.

4. (Currently Amended) In a transaction based system, a method of managing transactions comprising the steps of :

opening client accounts;

recording client information;

executing business transactions; and

updating at least one user profile of a first user in response to one or more of the above steps, wherein said at least one user profile defines information which is available to the first user and data manipulation that the first user may perform, wherein said updating is performed in response to a second user's performance of one or more of the above steps.

5. (Currently Amended) In a computerized information management system, a method of managing financial portfolios comprising:

storing information in a database;

assigning a user profile to each of a set of users, wherein said user profile defines the information in said database which is available to a user, and/or the data manipulation in said database that the user may perform;

defining a set of rules governing how a first user action such as altering information in said database is to affect user profiles of users other than said first user;

automatically updating in accordance with said rules information in said database, wherein said updating is in response to said first user's activity; and

automatically updating in accordance with said automatic update of information said user profile of said first user and said user profiles other than said first user's profile in response to said first user's activity.

6. (New) An information management system comprising:

a first database having stored thereon at least one user profile;

a user profile and session manager configured to process the at least one user profile to determine which information is available to a user and a data display format that at least in part defines system operation;

a second database having stored thereon user transaction information;

a transaction manager configured to determine transactions that the user is authorized to perform;

a business logic manager configured to execute the transactions that the user is authorized to perform; and

an information manager configured to store the executed transaction in the second database.

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7. (New) The system of Claim 6, further comprising a presentation dialog manager configured to display the data to the screen according to the user profile.

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